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ABSTRACT

Canadian Policy Research Networks, with the sponsorship of the Canadian Millennium Scholarship Foundation, organized a conference on Access to Post Secondary Education (PSE) that brought together a cross section of experts and stakeholders, including government representatives, to discuss trends in participation, access, and financial and other support. This report summarizes papers presented at the conference and the discussions they provoked. The first session, "Trends in PSE," featured papers on trends in PSE and costs, PSE participation and student continuation, and trends in PSE finance and capacity. The second session, "Preparedness for PSE," focused on academic achievement among Canadian youth, male underachievement, and PSE counseling in the context of career paths. Session 3, "Participation in PSE," considered the roles of family, neighborhood, and government in PSE participation. "Financial Assistance for PSE," the fourth session, presented reports on student income and expenditures, student loans and debt, and student needs assessment. "Intervention Programs" were the focus of the fifth session, with papers on academic intervention in the United States and aboriginal participation in PSE in Canada. Session five also included a discussion of the federal government's Innovation and Skills and LearningAgendas. The discussions that concluded each of the sessions made it clear that there was broad agreement among participants that the prime focus of debate on access to PSE has shifted from a focus on student finance in the 1990s to a concern with equal access and the social values underlying PSE. (SLD)

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A Canadian Policy Research Networks Conference sponsored by the Canada Millennium Scholarship Foundation

Ottawa, April 5 and 6, 2002

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Foreword

More than ever, issues around access to post-secondary education rank high on the national agenda. Globalization, innovation, knowledge, skills, and education are driving both personal and societal choices – witness the federal government's recently released reports outlining Canada's Innovation Strategy. Provincial governments are trying to balance the goals of cost-efficient spending and building the education, knowledge and skills of their populations.

To help inform these personal and societal choices, Canadian Policy Research Networks, with the sponsorship of the Canada Millennium Scholarship Foundation, organized a 2-day conference on Access to Post Secondary Education in April 2002. The conference brought together a cross-section of experts and stakeholders – academic researchers, students, administrators of post-secondary institutions, and representatives of provincial and federal ministries – to discuss trends in participation, who has access and who has not, financial support, and other forms of support. The conference was designed to identify what we know about these issues, as well as the many gaps in knowledge that need attention.

Fortunately, Canadian analysts are on the brink of a new wealth of data sources related to education, thanks to major investments in data collection by the provinces and by the federal government. These new data sources will be essential to finding the answers to the many research needs identified at the conference. But the conference went beyond the need for facts and figures, raising such questions as: What do we mean by 'access,' 'post-secondary education,' 'equity', and 'efficiency'? And what are our societal goals with respect to post-secondary education?

This report summarizes the papers presented at the conference and the discussions they provoked. By making this report widely available, we hope to stimulate public discussion and debate about future directions for the post-secondary system in Canada.

I would like to take this opportunity to thank the Canada Millennium Scholarship Foundation for its sponsorship of this event. I would also like to thank a number of individuals who worked hard to make the conference the success it was, especially Gisèle Lacelle, Event Coordinator, CPRN; Kathryn McMullen, Senior Research Analyst, CPRN; Alex Usher, Canada Millennium Scholarship Foundation; and Nigel Chippendale, Sussex Circle Inc. Special thanks are due Dr. James Downey who chaired the conference with grace and skill.

Judith Maxwell, President
July 2002

Executive Summary

The Chair, James Downey, University of Waterloo, stated that the purpose of the conference was to discuss current research about incentives and impediments to Post-Secondary Education (PSE); to identify the gaps in that knowledge and develop a future research agenda; and to expand the discussion around financial, social, cultural, and personal issues.

Norman Riddell of the Canada Millennium Scholarship Foundation explained that the Foundation wanted to develop new approaches to PSE access and to encourage Canadians to think about the issues. The Foundation had asked Canadian Policy Research Networks (CPRN) to help in developing a program of research. The current conference was intended to provide an update on progress and to ensure that all the interested parties – including academics, student groups, federal and provincial officials – were involved.

Session I: Trends in PSE

Trends in Post-Secondary Participation and Costs: Jillian Oderkirk, Centre for Education Statistics, Statistics Canada, presented recent data on PSE trends. Research shows increasing rates of high school completion in recent years, together with very high aspirations to participate in PSE on the parts of parents and youth. University participation rates rise substantially with higher income; there is also a strong correlation between parental education and PSE participation. There has been a sharp increase in tuition fees, but little increase in family income since 1990. In the long term, the earnings trajectories for different fields of study tend to converge.

Why Don't They Go On?: Dianne Looker, Acadia University, explained that PSE participation is affected by a complex set of family, personal, attitude and performance factors. Cost is the most important reason for not continuing to PSE but there is a wide variety of non-financial reasons. Parents' education has a major impact. Other obstacles to participation in PSE include: other interests, a desire to work, perceptions that PSE has a low payoff in the labour market, uncertainty about plans, lack of study skills, and having other preferred ways to spend available money. Barriers include a lack of awareness of PSE as a viable option, a lack of money, and a lack of academic ability. Schools are an important source of information about PSE opportunities, yet the information they provide is often inaccurate or incomplete.

Trends in University Finance and Capacity: Herb O'Heron, Association of Universities and Colleges of Canada, argued that capacity constraints in PSE institutions will limit participation over the coming years. Scenarios for university enrolment show increases of 100,000 to 300,000 by 2011. Accommodating even the mid-case scenario (190,000) would require an expansion of some 30% in university capacity. A similar increase in college capacity would be needed, and even then there would still be 1.1 million (60%) of the 18-21-year-old age cohort not enrolled in PSE. Changes in university financing formulas have meant a decline in government support. Infrastructure continues to deteriorate, while demand for space grows. Shortages of faculty will get worse and the faculty-student ratio will continue to deteriorate. Overall quality will decline along with equity of access. The additional cost of teaching and research services to meet new

needs will range from $2 to $6 billion per year, while some $3.6 billion is needed for deferred maintenance.

Session II: Preparedness for PSE

Academic Achievement among Canadian Youth: Scott Murray, Centre for Education Statistics, Statistics Canada, presented initial results from the Program for International Student Assessment (PISA) and the Youth in Transition Survey (YITS). PISA 2000 showed Canadian youth second in literacy, and ranking very high in mathematics and science. Canada exhibits far less variation in reading scores across socio-economic groups than most other countries. Alberta scored highest in literacy but even the lowest ranking provinces performed at or above the middle of the international range. Girls scored higher in literacy, boys in math, and girls and boys about equal in science.

Male Underachievement in School Performance: Nancy Mandell, York University, explained that this issue is regarded as a serious problem in the UK and Australia, but not in Canada. It is clear in many countries that some groups of boys perform poorly in the school system and have low rates of participation in PSE. These include Aboriginal boys, some visible minorities, those from low income families and some who come from foreign language homes. The failure of boys is often attributed to external factors such as poor teaching, while success is attributed to "inherent potential." By contrast, the successes of girls are often credited to good teaching. Dr. Mandell presented a number of theories for boys' under-performance. She suggested that viewing the issue as a simple dichotomy between male and female performance tends to distract from identification of the real issues, which are more complex.

Valued Career Paths – Broadening the Scope of Post-Secondary Education: Bryan Hiebert, University of Calgary, spoke about the role of guidance and counselling in access to PSE. He suggested that we need to see PSE as consisting not just of college and university but including trade skills and other forms of learning. The PSE experience should be driven by the learner's passion and vision for life; the activity of planning for life matters more than the specific choices the individual makes. Most career problems of youth arise mainly from a lack of planning skills and from lack of information about possibilities. Youth should develop flexibility to adjust to transitions.

Session III: Participation in PSE

Participation in PSE – Exploring the Roles of Family and Government: Paul Anisef, York University, and Robert Sweet, Lakehead University, reported on work using the Survey of Approaches to Educational Planning (SAEP). SAEP provides data on how parents help children prepare for PSE in social, cultural and economic terms. Dr. Anisef suggested that more work is needed on whether current student aid programs are effective in improving equity. The increasing cost of higher education has little impact on high income families but may restrict access to PSE for others. We also need to understand better such life transitions as school-to-work and starting a family. Dr. Sweet discussed the roles of parents in creating a home learning environment, including encouraging effort and performance, fostering attitudes and perceptions and engaging in long-term financial planning. He indicated that the survey would provide information on the methods used by families to prepare for PSE, the amounts of money involved, and their saving plans and other financial strategies.

Family Background Effects and the Role of Student Financial Assistance: Ross Finnie, Queen's University, noted that in recent years, researchers have begun looking beyond financial issues to consider a wider range of factors affecting participation in

PSE. He suggested that the usual emphasis on student financing, debt and tuition costs leads to programs that are income regressive and ineffective in promoting equity of access. Dr. Finnie stated that access to PSE is limited by capacity constraints and rationed by ability, calling for work to understand better who is squeezed out as the price rises. He argued that the basic strategy for student access should be to increase the availability of loans in order to improve both fairness and efficiency. William Easton of the National Professional Association Coalition on Tuition commented that the deregulation of tuition fees for professional programs will not only affect the choice of career by many students but also their choice of where to practice after graduation. The increases in tuition fees are, he said, on the verge of seriously restricting access to PSE.

Community, Neighbourhood and Family Factors in PSE Participation: Dan Keating, OISE and the Canadian Institute for Advanced Research, discussed human development barriers to participation in PSE. He suggested that the fundamental challenge facing society is innovation, both technological and social. He argued that societies face a choice between (a) creating social and cognitive elites, while marginalizing the rest of the population, and (b) creating a learning society with mass participation in human development, widely distributed competence and a collaborative approach to knowledge building. He sees the latter as both more equitable and more efficient, making PSE a matter of broad social and economic concern, not just an equity issue. Dr. Keating stated that societies with a relatively flat socio-economic status gradient tend to have better overall learning outcomes. Hence public policy should be concerned about large income and wealth disparities, unequal distribution of developmental opportunities, and inadequate investment in social capital (such as spending on PSE).

Session IV: Financial Assistance for PSE

Report on Student Income and Expenditure Survey: Susan Galley, Ekos Research Associates, provided an overview of the Canadian Student Financial Survey which is being undertaken on behalf of the Canada Millennium Scholarship Foundation. Approximately 2100 students were selected to participate in the study and it is expected that about 1000 will complete the year-long survey. The survey will provide a picture of each student's financial situation at the beginning of academic year 2001-02 and is collecting detailed monthly information on expenditures and income. The survey results will show, for example, which students incur debt, debt levels, costs for specific expenditure types, who works throughout the year and the impact that might have on marks, and so on.

Student Loans and Student Debt: Alex Usher, Canada Millennium Scholarship Foundation, argued that what really matters is not the absolute size of a student's debt, but the ability to repay. Analysis is difficult, however, because income changes rapidly in the early years of employment. Mr. Usher discussed the alleged "$25,000 average debt" that has become widely accepted. He argued that the main reason for increasing student debt in the 90s was that loan limits increased substantially at about the same time as most provinces phased out grants in favour of loans. Rising tuition was a factor, but not the overwhelming cause it is often seen as being. He concluded that average debt on graduation of those who borrow during a four-year program is probably about $20,000. The level is higher in professional programs, partly as a result of higher tuition, and partly because the students borrow for more years.

Improving Student Aid Needs Assessment – Issues and Options: Fred Hemingway identified three major PSE access concerns: restricted government budgets; rising PSE

costs; and stagnant family income. His review showed that problems with current Canadian student aid include the treatment of income while in school, parents who are unable or unwilling to provide the deemed level of assistance, the contribution expected of middle class families and inequities in the treatment of families with more than one child attending PSE. He saw current levels of aid as too low for many students and arrangements for need assessment as too burdensome. Mr. Hemingway's conclusion was that the current federal student aid system is doing a reasonable job, but pressure points have developed that need to be addressed. Commenting from the floor, Mike Conlon, Canadian Federation of Students, said that the ideological issues of student debt need to be addressed. Some students might make career decisions on the basis of cost and ability to repay, or their academic performance could be affected by working during the school year. He suggested that differences in student debt raise serious questions of equity in access.

Session V: Intervention Programs

Academic Interventions for PSE in the United States: Scott Swail, Council for Opportunity in Education, Washington, discussed efforts in the US to improve educational opportunity. Gaps between income groups persist with respect to both participation and successful completion. Experience with programs for youth in middle and high school shows that financial assistance must be accompanied by other forms of support. Efforts are needed to improve awareness of higher education opportunities, to improve academic achievement and self-esteem, and to encourage parents to support their children's education. He stated that we don't know enough about how and why such programs work, but that the research shows that individual contact is what matters most – the question is how to achieve it.

Investing Early: Early Intervention Programs the USA: Alisa Cunningham, Institute for Higher Education Policy, Washington, reported that awareness counselling and academic enrichment are primary elements in most intervention programs studied, while many combine both financial and non-financial support. The choice is often between providing a wide array of services for a relatively small number of children and providing less costly and less intensive services to larger numbers. Arrangements for implementing the programs are often very complex, involving many different agencies and delegated authority. While the evaluation data are weak, the research shows that positive outcomes are associated with early and multiple interventions, academic support, on-going, positive contact with adults, and coordination among different programs and services.

Aboriginal Participation in Post-Secondary Education: Robert Malatest reported that the PSE participation rate of Aboriginal youth, while increasing, is still low, while their rate of dropout from PSE remains very high. Aboriginal students include a high proportion of women and have a relatively high average age. Barriers to Aboriginal participation include distrust of institutions, lack of adequate secondary school preparation, community poverty, reluctance to leave the community, and perceived discrimination. Mr Malatest noted that there are few Aboriginal PSE institutions in Canada. Funding for programs and services of support for Aboriginal students is uncertain and inadequate. Success factors for Aboriginal students include community delivery, access programs and active recruiting. As well, there needs to be a partnership giving the community a say in program design and delivery.

HRDC Skills and Learning

Peter Larose, Skills and Learning Policy Directorate, HRDC, discussed the federal government's Innovation and Skills and Learning Agendas. He observed that three sets of factors are driving the need for learning and skills development: rising skill requirements; shifting labour force demographics; and advances in our understanding of how learning takes place, including early childhood development and adult learning. Mr. Larose explained that HRDC aims to consult on the directions and milestones, how progress can be measured, and what steps need to be taken. Among the HRDC priorities, he identified improved financial assistance for part-time students and people facing barriers, including persons with disabilities, those with low literacy skills, and Aboriginal Canadians. He also mentioned support for training in the skilled trades and promotion of the role of community colleges. He indicated the willingness of HRDC to help define and support the PSE research agenda.

Closing Remarks

Keith Banting, Queen's University, commented that, in the current view, education is a key link between the social and economic policy agendas. However, the relatively modest investment of public resources in PSE fails to match the expectations of the public in this area.

He noted that not only are PSE institutions evolving, but the frames of reference, goals and criteria for progress are all changing. The discussion of PSE has broadened to address a wide range of influences – the "determinants of education attainment." The debate should engage the public in such questions as the fairness of large student debt loads and deal explicitly with the related values and ideology, while research should also address goals and values.

Finally, on behalf of the Canada Millennium Scholarship Foundation, Alex Usher looked forward to a conference in 2003 to explore the results then available from the on-going research.

Conclusions: Issues and Research Topics

Drawing on the conference presentations, the plenary discussions and the small-group discussions, the conference organizers distilled the key messages and future directions for research. There was broad agreement among participants that the prime focus of the debate on access to post-secondary education has shifted since the 90s. While matters of student financing, such as loan limits, interest relief and debt load remain important, broader issues of access have come to the fore in recent years. These include not only how many people should participate in PSE, but whether opportunities are equitably available to all who might benefit. In other words, the discussion has, to a degree, shifted from mechanisms of access to the underlying social values involved.

The main themes identified for further research include:

The PSE System:

- Vision and goals – access for all or for some, and how should PSE spaces be rationed?
- Size and mix – scale and composition of the Canadian PSE system;
- Costs – overall costs of different scenarios;
- Capacity crunch – scale of problem and kinds and levels of investment needed to match supply and demand;

- Quality – of infrastructure, teaching resources, overall learning experience;
- Impact of increasing PSE participation – in terms of quality, social and private returns to education;
- Expectations – is there sufficient capacity to meet high expectations of parents and students?
- Efficiency versus equity – size of trade-off between efficiency of the PSE system and equity in access; and
- Alternative delivery of PSE – potential role of distance education, e-learning, and other alternative delivery mechanisms.

Decision to Participate:

- Early influences – early childhood experiences and interventions;
- Parental roles – how are these influenced by parental education and income, educational planning, interventions ;
- Young males – is there a problem; what factors play a role in male and female achievement?; and
- Information and counselling – when and how do families get the information they need to make longer-run educational decisions.

Groups Not Well Served by PSE:

- Special groups – how does access vary across sub-groups in the population?;
- Succeeding in PSE – PSE persistence, barriers/obstacles leading to dropping out before completion;
- Meeting skill needs – for those who do not go on to university or college;
- Alternatives to PSE – role for high school in skills development? Other PSE alternatives;
- Corrective actions – flexibility and choice in PSE to meet variety of learning needs, creating a culture of lifelong learning in Canada; and
- Implications of inaction – implications of a future of educational 'haves' and 'have-nots.'

Financial Issues

- Financial factors in the PSE decision – impact on whether to participate in PSE, where, program of study;
- Deregulation of tuition fees – impact on diversity and representation in higher-cost programs, especially professional programs;
- Impacts of student loans – debt load, differential impact on families with different income levels, more than one child in PSE;
- Debt repayment issues – debt-to-income ratios following graduation; impact on other life decisions, like home-buying, family formation;
- Debt relief measures – availability of debt relief; availability of information; impacts on decisions like field of study, program length, choice of institution; and
- Attitudes to debt – do attitudes vary across sub-groups in the population?

Opening Remarks

The Chair, **James Downey of the University of Waterloo**, opened the Conference by welcoming participants and outlining the agenda.

Dr. Downey summarized the purpose of the conference as being:

- to disclose and discuss current research about incentives and impediments to Post-Secondary Education (PSE);
- to identify the gaps in that knowledge and develop a future research agenda; and
- to expand the scope of the discussion around issues considered to have an impact on access to PSE – financial, social, cultural, and personal.

He remarked on the importance and urgency of discussing these matters, pointing out that in announcing the Canada Millennium Scholarships to the House of Commons, the Prime Minister had said "There can be no greater millennium project for Canada and no better role for government than to help young Canadians prepare for the knowledge-based society...." Consequently, said Dr. Downey, anything that helps to enhance the effectiveness of the Canada Millennium Scholarship Endowment Fund is a contribution to our country and our economy.

He went on to suggest, however, that PSE is not just about the economy. Education at its most important and its most redemptive is about the transformation of individuals from ignorance and awkwardness to competence and the sense of fulfillment that gives pride and purpose to life. To be sure, he said, education has always had an economic and a social value and now has these more than ever, but its greatest worth lies in the empowering potential it releases in people through the skills, knowledge, and confidence it confers.

Dr. Downey noted that the prime focus of the conference was, properly, somewhat narrower than this, but he suggested that recalling the greater context in which the discussion takes place might give the proper sense of urgency to the discussion.

Dr. Downey then introduced **Norman Riddell**, Executive Director and CEO of the Canada Millennium Scholarship Foundation.

Mr. Riddell explained that the Canada Millennium Scholarship Foundation (CMSF) saw part of its mandate as being to develop new approaches to PSE access and to find new vehicles for encouraging Canadians to think about these issues. One problem that had hampered the debate on student financial assistance to date was, he said, a serious lack of data. Helping to correct this situation was a priority for the CMSF.

Accordingly, a year or so previously, the CMSF had asked Canadian Policy Research Networks (CPRN) to help in developing a program of research. The result had been the Workshop on Post-Secondary Access and Student Financing, held on February 1, 2001, which helped to develop a research agenda. The purpose of the current conference was, he said, to provide an update on progress and to ensure that all the interested parties – including academics, student groups, federal and provincial officials – were involved. The List of Presenters, List of Participants, and the Conference Agenda are included in the Appendices to this report.

Session I: Trends in Post-Secondary Education

Trends in Post-Secondary Participation and Costs

Jillian Oderkirk of Statistics Canada explained the analysis that she is conducting on barriers to access and the financing of post-secondary education, as well as issues related to the social and academic engagement of students and their non-school activities.

Ms. Oderkirk provided an overview of trends, among the highlights of which were:

- More youth are completing high school than ever before, with young women more likely to complete than young men.
- The great majority of youth 18-20 years aspire to PSE, with over 65% of graduates aspiring to university and 25% to college/CEGEP/vocational school, etc.
- The percentage of 18-21-year-olds who participate in **college** is slightly less than 30 per cent, regardless of family income. However, the rate of participation in **university** rises from about 20 per cent for youth from families in the lowest quartile of family after-tax income to close to 40 per cent for youth from families in the highest income quartile.
- Parents' education has an even greater impact than their income on PSE participation.
- Most parents want their children to attend PSE but less than half are saving for it.
- Tuition fees have risen sharply since 1990 but median family income has been flat.
- University participation rates for 18-21 year olds have been flat overall since the early 90s and declined for men. College participation has risen for both men and women.
- Average student loans at graduation rose from $7,000 in 1986 to $11,000 in 1995.
- The proportion of high school students who continue to university also varies with distance to school, with participation rates decreasing as distance to school increases.
- Employer support for adult education is growing but total numbers remain small.
- The earnings trajectory after university has been steeper for recent graduates, whose average salary starts lower but climbs faster than that of earlier cohorts.
- In the long-term (20 years) the earnings trajectories for different fields of study tend to converge: salaries for education, arts and humanities rise to meet those for social sciences, engineering and health.

Why Don't They Go On: Factors Affecting Youth Who Do Not Pursue PSE

Dianne Looker of Acadia University explained that data on school leavers show that PSE participation is affected not by just one factor but by a complex set of factors (family, personal, attitudes and performance). For example, the PSE participation of children from single parent families may be affected more by low family income than the absence of one parent per se.

Dr. Looker reviewed findings of the School Leavers Survey (1991) and the School Leavers Follow-up Survey (1995), pointing out that cost was the most frequent reason given as most important by high school graduates who did not continue to PSE. There were, however, a wide variety of non-financial reasons. She concluded that money matters in PSE access, but so do many other factors. In particular, parents' education matters a great deal, especially for young people's level of interest in PSE. Lack of money was a bigger issue for those who started PSE, but did not complete.

She reported that the study shows that obstacles to participation in PSE include: other interests, a desire to go to work, perceptions that PSE has low payoff in the labour market, uncertainty about plans, lack of study skills, and having other preferred ways to spend available money.

Dr. Looker also reported on the results of a second study that collected qualitative data from 62 high school graduates and non-graduates between the ages of 23 and 26. She made a distinction between factors that act as barriers to participation in PSE as opposed to reasons for not participating, with the latter reflecting choices. Barriers included: a lack of awareness of PSE as a viable option; a lack of money; and a lack of academic ability. Reasons, on the other hand, included:

- having other priorities;
- thinking that PSE is not really necessary as a preparation for the labour market;
- not feeling ready for PSE;
- feeling that one's study habits are weak;
- not being sure what one wants to do.

For those who reconsidered going on to PSE but decided not to do so, the reasons included: lack of interest in PSE, lack of familiarity with the process, debt load issues, family responsibilities (including needing daycare), the risks associated with leaving a good job, parental influence and the influence of friends.

Dr. Looker noted that schools were seen as an important source of information about PSE opportunities, yet the information they provide is often inaccurate or incomplete. She concluded that high priority should be attached to providing better, more accessible, and more coordinated information for youth. Such information needs to be provided early (e.g., Grade 10), before attitudes are fully formed, decisions are taken and doors closed by decisions about courses. Also, more information should be provided about assistance available in PSE institutions for students with special needs (e.g., physical or learning disabilities), as many are discouraged from continuing by the perceived difficulties.

Commenting on the findings, Dr. Looker suggested that one should not work on the assumption that all youth should attend PSE. This is not realistic and would largely negate the economic advantages of PSE to individuals, thus removing much of the incentive to participate.

She pointed out the major impact of parental influence and role modelling and suggested that consideration should be given to how this might be enhanced (through, for example, the promotion of lifelong learning). There is a need to influence parents, by providing them directly with more information about PSE. She also suggested that alternatives to parental support be explored where these could be beneficial.

She reiterated the critical importance of providing timely, appropriate information to young people, including good information on PSE financing. Last, she expressed concern that there might be a lack of suitable jobs on graduation for those who do complete PSE, thus undermining the benefits. Hence, an economy that generates good jobs also is important.

Trends in University Finance and Capacity

Herb O'Heron of the AUCC examined the possible implications of demographic and participation rates for university enrolment over the next ten years, arguing that capacity constraints in post-secondary institutions will represent a very significant barrier to increasing participation in PSE over the coming years. Four key factors are driving rising demand for PSE: demographics; labour market shifts; family socialization; and the goal of ensuring equity in access.

He began by offering three scenarios for university enrolment expansion, starting from enrolment of 625,000 in fall 2001. The "constrained" scenario, which assumes only minor increases in the participation rate and which is driven primarily by growth in the youth population, leads to an increase of 100,000 full-time students by fall 2011. The mid-case scenario, based on participation rate increases similar to those seen in the decade of the 1980s, produces an increase of 190,000. And the "responsive" scenario, which assumes that about half of those who aspire to attend university will actually do so, results in an increase in enrolment of around 300,000.

Mr. O'Heron suggested that accommodating even the mid-case scenario would require an expansion of some 30% in university capacity. Putting this increase in perspective, he noted that this would be the equivalent of adding another major university in each province – like Memorial, UPEI, Dalhousie, UNB, Laval, University of Toronto, and the Universities of Manitoba, Saskatchewan, Alberta and British Columbia. He noted that a similar increase in college capacity would be needed, and that even after such expansion there would still be 1.1 million (60%) of the 18-21 age cohort not enrolled in PSE.

He argued that the projections of increased demand are not extravagant as there are strong factors driving it. First, given the strong relationship between participation in PSE and parental education and the fact that PSE completion rates among the members of the Baby Boom generation are higher than for previous generations, one can expect high participation rates among their offspring – the Baby Boom Echo. Second, the emerging knowledge economy will drive demand for PSE graduates. Third, the pay-offs to a university education continue to be high – both in terms of job growth and potential earnings – and that message appears to be getting through to young people and their parents. He also suggested that the increase in tuition fees will not greatly affect this demand.

Mr. O'Heron commented that in the 1990s, provincial governments had changed the formula for university financing to remove the link to enrolment. This contributed to a decline in government support and exacerbated an existing problem of inadequate

physical plant capacity. He said that the infrastructure continues to deteriorate as a result of inadequate maintenance and replacement, while demand for space grows.

There are also serious shortages of faculty, a situation which will only get worse as retirements continue. The result is that the faculty to student ratio, which has declined steadily over the past 15 years, will continue to deteriorate. The result of crowded facilities and large increases in faculty load is a significant decrease in overall quality. It seems unlikely that students will accept further decreases, especially given that tuition levels have been rising.

Capacity constraints also have big implications for equity of access. When there is excess capacity, universities can offer spaces to a much wider range of students. When the universities are filled to capacity, they are very likely to resort to selection criteria that are heavily weighted to grades. Student aid needs to be readily available to all those with the grades and the desire to participate in PSE. But equitable access might also require expanded capacity so that escalating grade requirements do not exclude many capable students.

Increases that can be expected in the number of PSE students over the coming decade, coupled with an expected large increase in the rate of retirement among existing faculty, also have major implications for faculty hiring needs. Over the last 20 years, enrolment has increased by 60 per cent while faculty grew by only 8 per cent – in fact, faculty numbers are now 10 per cent below the level in the mid-1990s. Over the next decade, Canadian universities will need to hire almost 30,000 new faculty – almost as many as currently exist in the system. The cost of meeting the new demands for teaching and research services alone will range between $2 and $6 billion, depending on which scenario proves to be correct. Currently $3.6 billion is needed to meet deferred maintenance needs alone.

He suggested that growth in the economy should be sufficient in this decade to enable such an investment to be made, and that the increase in tax revenues which it will generate (through higher taxes paid by university graduates) will more than repay the investment. Hence the next ten years should be a period for governments to invest in rebuilding Canada's higher education system.

Mr. O'Heron commented that during the 1990s, many nations had passed Canada's level of university participation. For example, OECD data show that in 1998-99, participation in the US and UK stood at approximately 24% compared to 18% for Canada. He suggested that this showed that Canada should strive to increase, not limit, university and college participation rates in the decade ahead.

Mr. O'Heron concluded by noting that research on the capacity/quality issue is currently underway at the Association of Universities and Colleges of Canada, with a report scheduled for release later this year.

Discussion

On the question of differences in PSE accessibility across socio-economic groups, the evidence is not clear. For example, in response to a question from **Larry Dufay of the Canadian Association of University Teachers (CAUT)**, Ms. Oderkirk explained that Social Survey data indicate that overall, the gap in income-related participation rates is not widening. However, Ms. Looker commented that the gap between the lowest group and those in the mid-to-upper range is increasing.

Mike Conlon of the Canadian Federation of Students (CFS) expressed doubt about the claim by university presidents that rising university tuition fees do not affect access to PSE, saying that CFS data indicate otherwise. He added that high fees and the attendant debt load can also affect the willingness of legal workers, doctors, etc. to move to rural areas or to work in legal aid, for example. Mr. O'Heron commented that university presidents have made a commitment to provide major increases in institutional student aid to protect accessibility.

Mr. Conlon called for more detailed tracking of students to demonstrate the impact of increasing tuition fees. Ms. Oderkirk said that the Youth in Transition survey would help to understand such issues, as it would track young adults to age 30.

Scott Davies of McMaster University suggested that recruitment of faculty is driven more by research considerations and funding than by the need to teach undergraduates. The universities, he said, are making up for this by an increased "casualizing" of the teaching force – i.e. using sessional lecturers. He also noted that the federal government is constrained in what it can do. Its only direct influence on PSE issues is through its ability to affect research capacity – issues relating to enrolment and teaching are in the provincial jurisdiction.

Robert Sauder of HRDC Skills and Learning asked whether we are currently facing a "last mile" problem, where it gets harder to increase participation as the participation rate increases. Mr. O'Heron said that on the contrary, we are nowhere near the last mile. There remain 1.1 million young people in the prime PSE age group (18-21) who are not enrolled and a high level of demand for more access. The other two speakers agreed.

Jennifer Orum of the Canadian Association of Student Financial Aid Administrators (CASFAA) asked whether students in high school have adequate information about PSE opportunities and whether more needs to be done to help them learn how to access the opportunities that do exist. Diane Looker responded that there is indeed more that can and should be done to teach students to obtain and interpret information. Those with high-income, high-education parents tend to get help at home, but others rely on schools whose counselling budgets have been cut back in recent years. Course selection in high school and at the post-secondary level has become more complicated and schools often are unable to fill all the information needs. Often, too, students with the most problems are not the ones going to see the school counsellor. She noted that information technology can be helpful but does not solve the problem.

Session II: Preparedness for PSE

Academic Achievement among Canadian Youth – Results from PISA and YITS

Scott Murray of Statistics Canada presented an overview of initial results from the Program for International Student Assessment (PISA) and the Youth in Transition Survey (YITS). He explained that PISA is a survey of school performance of 15-year-olds in literacy, mathematics and science. The emphasis in 2000 was on literacy, while mathematics will be the special focus in 2003 and science in 2006. The same group will be followed for the YITS study over a period of 10-15 years. This work, he said, has great potential to provide new insights into school issues and PSE access.

Mr. Murray said that the results of the 2000 PISA were encouraging – Canadian youth are performing quite well in relation to the rest of the world. In literacy they are second, behind Finland, while in mathematics they are near the top of the list, behind Finland, Australia, Japan and Korea, and in science they are just behind Korea and Japan. Further, Canada, along with Finland and Japan, exhibits far less variation in reading scores across socio-economic groups than most other countries. Strong achievement overall, combined with strong performance across a wide cross-section of socio-economic groups means that most Canadian 15-year-olds would qualify for PSE.

He noted that there is considerable variation across provinces, with Alberta highest in literacy and eastern provinces generally lower. Nevertheless, even the lowest ranking Canadian provinces performed at or above the middle of the international range. The results also show gender differences, with girls scoring higher in literacy, boys in math, and girls and boys about equal in science.

He commented that an interesting finding concerned private schools. While their students performed well on the tests, once the results took account of students' socio-economic backgrounds, the apparent advantage disappeared.

Mr. Murray indicated that PISA-YITS was proving to be a major opportunity to understand factors relating to performance and access to PSE. It is likely that another cohort will be studied in about five year's time.

Male Underachievement in School Performance: Gender and Social Capital

Nancy Mandell of York University began by explaining that the phenomenon of male underachievement has been seen as a serious problem or even a crisis in a number of other countries, including the UK and Australia, but in Canada it has not been much noticed. Underachievement is demonstrated in several ways – in higher secondary school dropout rates, lower rates of participation in PSE, lower academic achievement, higher rates of delinquency, and so on. "Is there a real crisis?" she asked.

She responded that there is no doubt that in all these countries, some groups of boys do perform poorly in the school system and have low rates of participation in PSE. These include Aboriginal boys, those from some visible minorities, those from low-income families and some who come from homes where a foreign language is spoken. But other groups of boys do very well, going on to achieve lifetime incomes above those of similarly educated females.

Commenting on how perceptions of boys' and girls' performance differ, Dr. Mandell noted that the failure of some boys to perform well in school is often attributed to external factors such as poor teaching; when they succeed it is held to be their "inherent potential" that is responsible. By contrast, the successes of girls are often credited to good teaching (which overcomes a presumed lack of potential on their part)!

Dr. Mandell then reviewed the reasons given for boys' underperformance:

- Genetic: "Boys will be boys." Their inherent nature does not suit them to meeting the demands of the classroom.
- Feminism is to blame: Feminism is the cause of many problems today, including this one.
- Schools are to blame: Schools are inherently matriarchal and conduct teaching accordingly, to the disadvantage of boys.

- Anti-male curriculum: The content is oriented to females and thus disadvantages males.
- Schools are racist: The problem is not so much one of anti-male bias as of bias against the group to which the particular males happen to belong.
- Disappearing family: Most of the boys who perform poorly come from single parent or unstable families that do little to support their education.
- Class is the issue: The males who do poorly in school come from lower class backgrounds and are drawn into the labour force rather than completing school.

She suggested that while there may be some validity under certain circumstances to some of these ideas, viewing the issue as a simple dichotomy between male and female performance tends to distract from identification of the real issues.

Valued Career Paths: Broadening the Scope of Post-Secondary Education

Bryan Hiebert of the University of Calgary spoke about the role of guidance and counselling in promoting access to PSE. He suggested, first, that we need to conceptualize PSE in a broad framework, consisting not just of college and university but including trade skills and other forms of learning. Importantly, we must stop seeing any PSE outside of university, especially trades and apprenticeship training, as being second-class. There is a strong and growing need for workers in skilled trades. The danger is that we will acquire those skills through immigration while university graduates here remain jobless.

Second, he said, the PSE experience should be driven by the learner's passion and vision for life. Third, he suggested that the activity of planning for a career and for life matters more than the specific choices the individual makes.

He said that most career problems of youth arise mainly from a lack of skills in planning and from lack of information about possibilities. Schools often get the priorities wrong and fail to help students develop such skills.

Both youth and their parents often have unrealistic expectations. The great majority of young people expect to go on to university, but the reality is that less than one third do so. So what happens to the other two-thirds? What are schools doing to help them prepare for the work force?

He suggested that we should encourage youth to explore the full range of options, to gather information and to learn the process of planning. They do not need to decide irrevocably while still in school the direction that their careers will take. Rather they should develop flexibility to adjust to transitions.

People often need assistance at key transition points – when deciding what course options to take in high school; when making the transition from high school to PSE; throughout PSE; and during the final year of their program as they begin to look for a job.

Dr. Hiebert suggested a new set of messages for youth that could be summed up as "Focus on the journey, keep on learning, develop a vision and a plan for its realization, and believe in yourself."

Session III: Participation in PSE: Attitudes, Aspirations and Finances

Participation in Post-Secondary Education: Exploring the Roles of Family and Government

Paul Anisef of York University and Robert Sweet of Lakehead University reported on work that is underway using the Survey of Approaches to Educational Planning (SAEP). This survey, which will be replicated in fall 2002, deals with planning for PSE rather than participation per se. It looks at the intersection of family and school, exploring how parents help their children to prepare for PSE in social, cultural and economic terms.

Paul Anisef discussed two issues that he saw as needing further elaboration. The first was the transition to a knowledge-based society, as discussed in the HRDC paper on skills and learning. In the midst of this transition, governments have chosen to shift an increasing portion of the costs of PSE to the individual student and his or her parents. This has little impact on high-income families, but imposes a major burden on middle class families and those with more modest incomes. The introduction of the Canada Education Savings Grant (CESG) is seen as an example of government partnering with parents, but a study by CAUT suggests that the CESG may be regressive and could increase inequalities. The data from SAEP will allow such issues to be explored adequately for the first time.

The second issue needing investigation is whether, as claimed, life transitions such as school-to-work and starting a family have become more difficult. Dr. Anisef suggested that these transitions have at least become more complex, particularly given the uncertainties of the economy and the labour market. Moreover, it appears that socio-economic status affects both parental aspirations for their children and their ability to support their children in accomplishing their goals.

Robert Sweet discussed the roles of parents in creating a home learning environment:

- encouraging effort and performance
- fostering attitudes and perceptions
- engaging in long-term financial planning.

He indicated that SAEP would provide information on the methods used by families to prepare for PSE, the amounts of money involved, and their saving plans and other financial strategies.

As a preliminary result of SAEP, he reported that children of families with incomes below $40,000 have a 16% participation rate in Registered Education Savings Plans (RESPs), while those with incomes over $60,000 have a 58% RESP participation rate.

The detailed results will be published in book form. They will explore the impact on PSE participation of issues such as rural residency, working mothers, family structure and history and how families plan academic and vocational pathways.

Family Background Effects and the Role of Student Financial Assistance

Ross Finnie of Queen's University noted a fresh interest in PSE access in recent years, with researchers looking at a range of new issues, not just purely financial ones. The result is that Canada is becoming one of the better places for data on student assistance, a considerable change from the previous situation.

Dr. Finnie commented first on the broad context for studies of student aid. With respect to demand for PSE, the classic investment approach compares the value of the result with its cost, while the family background/social forces approach looks for a series of factors that influence choice, from academic achievement to financial situation to attitudes and behaviour. He characterized the conventional approach to access policy as focusing on student financing and debt and on such factors as tuition costs. There are two problems with this approach, he said. First, direct money costs of PSE are less important in influencing choice than is often suggested, and second, much of the policy that results is income regressive. We should look for ways to use public money to greater effect if we want to improve equity of access, he said.

Dr. Finnie turned to the question of whether there are better, more efficient policies to ensure access to PSE. To provide an analytic framework, he looked at PSE supply and demand relationships, pointing out that the market for PSE does not clear. Rather, excess demand faces capacity constraints and is rationed by ability. We have seen in recent years, he said, that the demand can increase (due to demographics and increases in the participation rate) even as the price (tuition) rises. What we do not understand well is how the rationing process works – i.e., who is squeezed out as the price rises. With a PSE system that is significantly supply-constrained, influencing demand has little effect on overall numbers – i.e., it affects *who* goes and the *quality* of the PSE experience.

If we are to rethink public policy, we need more research on the factors that really do affect participation – such as ethnicity, urban/rural, and school performance – said Dr. Finnie. The Post-secondary Participation Survey will begin to provide the data that are needed.

He argued that the basic strategy for student access should be to increase the availability of loans. This would increase both fairness and efficiency. He also suggested that consideration be given to asking students to accept a $1000 increase in tuition in return for matching amounts from both federal and provincial governments as a way of addressing the capacity issue. In the final analysis, capacity is probably the biggest barrier there is to access.

Community, Neighbourhood and Family Factors in PSE Participation

Dan Keating of OISE and the Canadian Institute of Advanced Research discussed human development barriers to PSE, defining human development in the broadest possible sense. He suggested that innovation was the fundamental challenge facing society and that the ability to innovate could be seen as a human resource. He also suggested that the notion not be limited to technological innovation; social innovation is equally important. Indeed, he said, social and technological innovation have happened together throughout human development.

He argued that societies face a choice of basic strategy. They can allow a social and cognitive elite to emerge, a layer of society which controls innovation and much of the wealth, while the mass of the population is marginalized into low-skill "McJobs" – a future

of technological "haves and have-nots." Or they can seek to achieve a learning society with mass participation in human development, widely distributed competence and a collaborative approach to knowledge building. He believes that the latter way is not only preferable from a social point of view but more efficient in economic terms. Thus he sees access to PSE as not just an equity issue but as a broad social and economic matter.

With respect to how human development takes place, Dr. Keating pointed to evidence showing that the brain continues to develop fully only if it faces cognitive complexity. This concept helps to explain how many issues of social and family background are reflected in the child's later learning ability.

Dr. Keating stated that societies in which the socio-economic status gradient is relatively flat tend to have better overall learning outcomes. This suggests that public policy should be concerned about large income and wealth disparities, unequal distribution of developmental opportunities, and inadequate investment in social capital (such as spending on PSE).

The barriers to healthy human development appear early and patterns established then are very hard to change later, said Dr. Keating. We need better longitudinal data if we are to understand the paths and trajectories of development and how they can be influenced.

Discussion

William Easton of the National Professional Association Coalition on Tuition (NPACT) expressed concerns about the trend to deregulation of tuition for professional programs. Price does matter, he said. The rising cost of tuition will not only affect the choice of career by many students but also their choice of where to practice after graduation. The increases in tuition fees are on the verge of restricting access to PSE. Ross Finnie responded that universities aim to plough back a significant portion of the increase into student aid in order to maintain accessibility. But there remain many unknowns in this field, he said.

Bruce Winer of Carleton University commented that rising costs mean that the risk of failure is borne disproportionately by low SES students. Hence, aid based on loans does create a disincentive effect. Ross Finnie agreed that more study is needed of such issues, but noted that interest relief and debt reduction measures within the Canada Student Loan Program (CSLP) represent a form of insurance for the individual student. Paul Anisef suggested that one outcome of rising PSE costs may be that students spend too much time working and thereby reduce the quality of their PSE experience.

Mike Conlon of the CFS stated that the Government had promised debt reduction for 20,000 borrowers while the real number had turned out to be more like 200. He asked how some universities could continue to offer, for example, law programs for $2,000 to $3,000 tuition when the University of Toronto is charging $20,000. He suggested that the demand for PSE is being driven by affluent parts of Canada while enrolments in places like Cape Breton are declining as costs go up.

Ross Finnie responded that overall quality is declining while universities do the best they can with the resources available. Students are paying more but getting less. It would be worth borrowing more if the result were that they received better quality education. Most people do not have serious difficulty repaying their student loans, he said, but where

there is a serious problem (as in Cape Breton, perhaps) then grants should be made available to maintain access.

Session IV: Financial Assistance for PSE

Report on Student Income and Expenditure Survey

Susan Galley of Ekos Research Associates provided an overview of the Canadian Student Financial Survey which is being administered by Ekos Research for the Canada Millennium Scholarship Foundation. The survey is currently under way and will last through the current academic year. A random group of approximately 2100 students, selected to ensure representation by age, type of schooling and province was invited to participate. Some 1500 accepted and it is expected that about 1000 will complete the entire survey.

She explained that the survey established baseline financial information at the beginning of the academic year, on earnings through the summer for example, and is obtaining monthly snapshots of income and expenditure. Income sources considered include gifts and loans from family, earnings from employment, government support, lines of credit, while expenses include accommodation, utilities, transportation, child care, debt payments, etc.

Ms Galley reported some preliminary results to indicate the kinds of information that will be available when the survey is completed:

- Some 64% of those aged 18-19 are getting parental support, declining to 21% for those aged 26 and over.
- Many other issues are also age-related – e.g., credit card usage increases rapidly with age, as does credit card debt and line-of-credit debt.
- Summer employment income ranged from about $2400 for students 18-19 years to $4400 for those 26+, averaging $3200 for all ages; one in ten participants reported no summer income.
- Some 65% of students work during school months; this appears to have little impact on their grades. The average hourly wage ranges with age from $6 to $8.

Ms. Galley commented that although a sample of 1000 is adequate to understand the broad outlines of student finance, to develop a detailed picture by province, gender, etc. would need a sample five to ten times larger.

Student Loans and Student Debt

Alex Usher of the Canada Millennium Scholarship Foundation commented that the climate for discussion of student aid is more positive today than it was in 1995, when the Government's Green Paper on Social Development proposed a major overhaul of the federal role in PSE support. His focus in the presentation was on issues of student debt load, an issue that has come in for a great deal of attention as debt levels have climbed since the early 90s.

Mr. Usher noted that what really matters is not the absolute size of a student's debt, but the ability to repay that debt – i.e. debt-to-income ratio – since some graduates are well able to pay off even relatively large student loans. Complicating the issue is that income

changes rapidly in the early years of employment. Moreover, individual circumstances vary so much that aggregation of data is sometimes misleading.

He outlined some of the problems encountered in assembling data on the real debt load faced by students:

- The most recent National Graduate Survey (NGS) was undertaken in 1999 and so does not capture the major changes in federal and provincial student aid policy that occurred, or had their major impact, in the second half of the 90s.
- The CSLP data base is more up to date than the NGS but shows only the federal part of student debt.
- Provincial data on loans and other student aid are not readily available, and neither are data on private borrowing.
- The average debt figures that are available cover only the "CSLP zone," excluding Quebec and the Territories.

He also clarified that average debt figures are only for those who borrow from government programs and have completed a four-year program. He noted that most student aid programs require the students to use up their savings first; therefore, they often do not borrow until after their first year of PSE.

Mr. Usher went on to discuss the alleged "$25,000 average debt" that has become accepted by many parties to the debate even though it has limited basis in reality. He explained that the main reason for increasing student debt in the late 90s was simply that loan limits increased substantially (from $105/week to $275/week) at the same time as most provinces phased out grants in favour of loans. Rising tuition was also a contributing factor, but not the overwhelming cause it is sometimes seen as being. He examined various estimates of student loans debt load and concluded that the best current figure for average debt on graduation of those who borrow during a four-year program is about $20,000. Average debt levels are higher for those in professional programs, partly as a result of higher tuition, and partly because the programs are longer, the students are older and therefore have been borrowing over a longer period of time.

Mr. Usher argued that students do not borrow simply according to need, but rather according to loan limits – "If you let people borrow more, they will. That's why debt increases." At the same time, he noted, 30-40 per cent of people have unmet need.

Mr. Usher concluded that there are no major policy changes on the horizon with respect to student aid in Canada. Consequently, the data from the next National Graduate Survey will for the first time in years reflect the current aid regime reasonably well. Thus the survey will provide data that are useful for thinking about student aid policy over the long term.

Improving Student Aid Needs Assessment – Issues and Options

Fred Hemingway, a consultant and former official with the Province of Alberta, identified three major post-secondary access concerns: restricted government budgets; rising PSE costs; and stagnant family income. These concerns have been accompanied by some significant trends: a shift from grants to loans and an accompanying increase in debt; a widening SES gap in universities; more rural students choosing college; growth

in the number of cost-recovery programs, especially professional programs; and rising credit card use by students.

Mr. Hemingway reported on his review of student aid need-assessment policy. The issues he examined included differences between Canadian and US student aid, the effectiveness of various approaches to assessment of need and means, levels of assistance, whether biases exist against certain student groups, and whether better ways might be found to conduct assessment in Canada. The main difference among jurisdictions with respect to assessment was whether student aid was based on a needs test or a pure means test. Needs tests provide aid based on the difference between the student's costs – tuition, books and supplies, living costs, transportation – and assessed income, including contributions from the student, parents and spouses. The means test approach considers only financial resources, not costs. He noted that unlike many social programs that rely on means testing, the student loan program instead applies needs testing.

Overall, Mr. Hemingway concluded that while the student aid program was generally working fairly effectively, some pressure points were evident:

- The current treatment of income while in school represents a disincentive to work and a barrier to funding certain legitimate costs. He suggested that consideration be given to raising the present exemption to enable students to cover unfunded expenses.
- The deemed parental contribution presents problems to some students, as their parents may be unable or unwilling to provide the assistance. Only 41 per cent of families are saving for PSE, for example, and more than one-third of students under the age of 22 are not receiving financial support from their parents.
- The formula used to calculate the contribution expected from parents has a number of problems: the allowed family standard of living is low; contributions are calculated based on current weekly income; and contributions increase with program length. The burden of this policy falls primarily on middle class families; for example, people with $80,000 in family income are expected to contribute some $30,000 over four years. This represents a strongly progressive "tax" of 75% on discretionary income. He also suggested that the contribution, which is calculated on a weekly basis, may be too high for families whose children are attending full-year courses and too low for those only attending PSE for a few weeks. An annual approach to the deemed contribution might be more appropriate
- The current arrangement seems inequitable in its treatment of families with more than one child attending PSE. If two or more children attend PSE simultaneously, the deemed parental contribution per child is much lower than if they attend at different times, since the size of the parental contribution is based on the number of children in PSE at any one time. For example, a family of four earning $90,000 living in Nova Scotia would be expected to contribute a total of $48,500 if their two children attended university at the same time, but they would be expected to contribute $97,000 if the children attended PSE at separate times. Options to consider include: reducing contribution levels by increasing family living allowances, decreasing the tax rate on discretionary income, capping contributions at a selected level, or all of these; providing unsubsidized loans for

parents with liquidity problems; or moving to an annual or lifetime contribution system, based on family income/expenditure models.

- On the question of unmet need, Mr. Hemingway distinguished between "unrecognized need" (i.e., legitimate costs that are not covered in the needs assessment, e.g. computer purchases) and "unfunded need" (costs that are recognized in the assessment but not funded because the aid limit is set too low). With respect to the former, he recommended that governments consider a more generous policy allowing "actual and reasonable" costs. For the latter, he suggested considering an increase in aid limits to $12-14,000 per year for a single undergraduate student, with the amount indexed to inflation. The current implied assistance limits, at $9,350 for 34 weeks, have not been changed since 1994. The cost of attending is now more than $5000 above the assistance available. In particular, there is a bias against low-income students living away from home, and against mature students.
- The assessment process is quite complex. Many of the calculations are based on estimates, because students are asked to apply early, yet the assessment itself is based on detailed formulas. The government could considerably simplify program administration while reducing the paper burden on applicants. One possibility would be a multi-year assessment with applicants relied upon to report changes.
- There should be a wider range of student aid mechanisms to suit different needs and circumstances.

Discussion

Mike Conlon of the Canadian Federation of Students suggested that large student debt loads raise ideological issues that were not addressed in the presentations. In particular, they could have significant social implications in that some students might make career decisions on the basis of cost and ability to repay. As well, attempting to minimize debt by working during the school year may affect a student's academic performance. He also queried whether family income had risen in recent years, as some speakers suggested, or had remained essentially flat throughout the 90s, as others claimed. With respect to tuition fee increases, he suggested that these must have had a significant impact on average debt loads, contrary to the impression given by Alex Usher. Finally, he asked the question as to why we find it acceptable that some young people, purely by "an accident of birth," are burdened by student loan debts of $20,000-$30,000? He suggested that this raises serious questions of equity in access.

In response, Alex Usher noted that Nova Scotia has the highest tuition of any province but only the seventh highest level of borrowing. He agreed that there are ideological issues involved in student loan policy that need to be explored, but he said that student loans have proved to be an efficient way to use public money to increase access to PSE. He also noted that parental education is a more important factor than income (though the two are linked) in determining the likelihood of children going on to PSE and commented that it is not the aim of student aid to equalize income in any direct way.

Session V: Intervention Programs

Academic Interventions for PSE in the United States

Scott Swail of the Council for Opportunity in Education, Washington, discussed efforts in the USA to improve educational opportunity for low-income and first-generation potential college students. He noted that higher education does pay off in terms of improved earning power, even though most qualifications provide a smaller premium than 20 years ago.[1]

All income groups have improved their college participation rates, he said, but the gaps between them have persisted. In seeking to improve this situation, we must define carefully what we mean by access, for initial access to college is of little value if students do not persist to completion. Access for whom and to what are key questions.

Mr. Swail stated that the situation in the USA and Canada with respect to helping improve educational opportunity is roughly similar in that education is a state (provincial) responsibility, with implications for what kind of role the federal government can take. In the US, the federal government can encourage school reform through research and targeted interventions that have focused on financial aid and student preparation. It focuses its efforts on helping at-risk, under-represented and unidentified young people in need of assistance. He discussed the US TRIO programs that have been operating for several decades, as well as the GEAR UP programs introduced in the past 3-4 years, as ways to encourage school reform. These kinds of programs target youth in middle school and high school. The formal mission of GEAR UP is stated as "to significantly increase the number of low-income students who are prepared to enter and succeed in postsecondary education." Mr. Swail noted that there are similar programs operated by community groups and not-for-profit organizations.

On the basis of a review of GEAR UP programs, Mr. Swail reported that experience shows that financial assistance (paying for college) is not enough – there must be other forms of support. Consequently, the various programs pursue a range of goals including college attendance, improved awareness of opportunities, exposure to higher education, academic achievement in school, enhanced self-esteem, and influencing parents to support their children's higher education. The programs tend to be targeted at youth from low-income backgrounds, youth whose parents have no PSE, and minorities.

There is a consensus that programs must start as early as possible. Certainly, most should begin before grade 12 and some people have proposed, at least partly seriously, that interventions begin in the maternity ward. Often the programs are sponsored by, and are located at, colleges or universities, providing 'exposure' for young people.

Most of the programs studied receive external funding, often from the federal government, and they are dependent on it to keep going. If the funding disappears, they tend to die.

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[1] "College" here is used in the US sense and generally refers to a four-year degree program.

Discussing the areas in which our knowledge is inadequate, Mr. Swail said that we don't know enough about how and why such programs work – identifying causality is a key priority. What is clear in broad terms is that important factors include the influence of mentors, peers and parents. Indeed, the main conclusion that one draws from the research is that individual contact is what matters in the end – as one commentator put it, "one arm around one child." The question for public policy is how to achieve such a goal.

Investing Early: Early Intervention Programs in Selected U.S. States

Alisa Cunningham of the Institute for Higher Education Policy, Washington, began by noting that in the US, gaps in enrolment rates persist, despite investment in financial aid. She also noted that many factors influence enrolment, both financial and non-financial.

Ms. Cunningham reported on a study undertaken for the Canada Millennium Scholarship Foundation of 17 programs of early intervention in 12 states (both large and small) considered to be leaders in this field. Such programs target at-risk students relatively early in their educational paths. The examples were drawn from a diverse array of programs covering both financial support (e.g., scholarships) and non-financial support (e.g., counselling). The aim was to understand the design characteristics of the programs in order to determine "what works."

Of the programs studied, nearly all provide non-financial services, while many combine financial and non-financial support. Awareness counselling and academic enrichment are primary elements in most programs. Some programs are focussed on a particular grade level (typically grade 7, 8 or 9), while others follow a cohort through school from, say, grade 7 to high school graduation.

The study identified a clear trade off between providing a wide array of services for a relatively small number of children and providing less costly and less intensive services to larger numbers. Given limited resources, program administrators frequently face this choice. Some provide tiered services, with greatest help going to those in greatest need.

Eligibility for the early intervention programs is based on a variety of criteria, including low parental income, participation of the child in subsidized programs, and identified risk of dropping out of school. Many of the programs require pledges or contracts with students and/or their parents.

Ms. Cunningham commented that the arrangements for implementing the programs are often very complex, involving many different agencies with authority often delegated. Financial structures vary greatly and include state support, federal support with state matching, and private funding.

On the question of what works, the study found there was very little evaluation data, the various programs were so different as to make comparisons of results difficult, and it was hard to identify impacts that resulted specifically from the program interventions. Problems with evaluation data included: failure to keep appropriate records; difficulty in disentangling different components; few attempts to link costs and benefits; lack of true comparison groups, especially random assignment; and difficulties associated with comparing across programs. Nevertheless, certain approaches appeared to be associated with positive outcomes and are reflected in an overall trend in programs towards:

- multiple components rather than single interventions;
- tutoring, mentoring and academic enrichment;
- starting early;
- making sure services are relevant to the age group;
- providing on-going, consistent, positive contact with adults;
- involving colleges and universities in programs; and
- coordination among different programs and services.

Best Practices in Enhancing Aboriginal Participation in Post-Secondary Education

Robert Malatest of Malatest and Associates Ltd. reported on a study conducted for the Council of Ministers of Education, Canada (CMEC) and the Canada Millennium Scholarship Foundation (CMSF) titled *Best Practices in Enhancing Aboriginal Participation in Post-Secondary Education: Canadian and International Perspectives*. The study was based on a literature review plus interviews with Aboriginal educators and representatives of institutions providing Aboriginal education.

The objectives of the study were to identify trends in Aboriginal PSE, understand barriers, point out best practices, and identify gaps and shortcomings in current efforts. Problems encountered included the general lack of data on Aboriginal students that results both because they are not identified by institutions and many chose to be omitted from the 1996 census.

Mr. Malatest reported that PSE participation rate of Aboriginal youth is increasing but is still only half that of Canadians as a whole. Moreover, the rate of dropping out of PSE is very high for Aboriginal students. A very high proportion of those in PSE programs are women and their average age is significantly higher than that of other students. Aboriginal students are more likely to enrol in social science and education programs than students generally and are less likely to enrol in other subjects, like sciences and maths. Roughly similar findings were observed for Aboriginal students in the other countries studied.

Barriers to Aboriginal participation in PSE were found to include distrust of educational institutions, lack of adequate secondary school preparation, the poverty of many Aboriginal communities, reluctance to leave their community, and perceived social discrimination.

The study looked at financial support available to Aboriginal students. In addition to the programs available to all qualified Canadians, certain Aboriginal students may receive support from Department of Indian and Northern Affairs (DIAND) programs; these however only cover status Indians on reserve and the amount of funding available is limited.

Mr. Malatest noted that there are few Aboriginal PSE institutions in Canada, particularly when compared with the USA, Australia, or New Zealand. In Saskatchewan, the Gabriel Dumont Institute of Native Studies and Applied Research provides PSE programs for Métis, while the Saskatchewan Indian Federated College serves the needs of First Nations. A number of universities and colleges, including UBC and Dalhousie, provide

programs and services of support for Aboriginal students. Funding for such initiatives, however, is reported to be uncertain and inadequate.

Programs provided by the institutions include outreach access and transition support, as well as support while students are enrolled. In some cases, community delivery of programs is available, which not only helps to increase the rate of success but also increases the likelihood that graduates will remain and work in the community. Programs geared specifically to Aboriginal students include legal studies, education and research.

The study found that success factors for Aboriginal students include community delivery, access programs and active recruiting. As well, it is important that there be a partnership that gives the community a say in program design and delivery.

Problems identified by the study included:

- Lack of support for certain Aboriginal students, notably Métis, non-status persons, and status Indians who are not strongly affiliated with a band.
- Loss of support by those Aboriginal students who discontinue then resume studies.
- Under-funding of Aboriginal institutions.
- High rate of failure among Aboriginal students.
- High dropout rate for students who are not receiving adequate support.
- Very low participation rate among Aboriginal men.
- Lack of other services needed by Aboriginal students, such as daycare and housing (particularly important since many Aboriginal students are older and female).
- General lack of Aboriginal curriculum development.

In closing, Mr Malatest said that there is a need to strengthen financial, social and academic support for Aboriginal students. To do this, it will be essential to assist Aboriginal institutions and support the delivery of programs in Aboriginal communities.

Discussion

Sue Drapeau of the Nova Scotia Community College commented that community colleges were under-represented in studies of PSE participation and support programs. More work is needed to identify the wide range of interventions, especially for Aboriginal communities.

Rob South of Canadian Alliance of Student Associations (CASA) noted the importance of understanding better the age profile of Aboriginal students and the implications for their participation and success in PSE. Mr. Malatest commented that the lack of data on Aboriginal students collected by institutions presented a serious impediment to understanding issues relating to mature Aboriginal students. He also commented that the difficulties encountered by Aboriginal students in relocating from their communities to attend PSE are a major source of problems. For example, the current $200 DIAND travel subsidy falls far short of the true cost of travel from remote areas.

Jean-Pierre Voyer of Social Research and Demonstration Corporation (SRDC) commented on the lack of data for evaluation purposes. He suggested that the research agenda should seek additional information on the returns to education and the labour market implications of PSE.

There were questions from several participants about the need to provide additional information on PSE to high school students. Scott Swail remarked that it was essential to help students and their parents understand that not going to college is more costly than paying for PSE.

Alisa Cunningham and Scott Swail both commented that there appears to be a positive ripple effect on other students from interventions for selected young people.

Monty Woodyard of HRDC wondered if there were data to show whether some of the Aboriginal students returning to PSE after leaving some years before might be ruled ineligible for Canada Student Loans through an earlier default. Robert Malatest agreed that this was a possibility but suggested that the practice of bands requiring continuous attendance from students they support was a bigger factor. Alisa Cunningham commented that experience at tribal colleges in the USA suggested that stop-out and drop-out were major phenomena for Aboriginal students. She also stated that the average age of Aboriginal males in those institutions was declining as youth saw the success of others through PSE.

Jillian Oderkirk of Statistics Canada explained that the National Graduate Survey was going ahead this spring, with data expected in a year or so. Also expected shortly is the report on the Follow-Up of 1995 Graduates and the Survey of PSE Financing.

HRDC Presentation: Skills and Learning

Peter Larose of the HRDC Skills and Learning Initiative discussed the approach being taken by the federal Government to advance its Innovation Agenda. This Agenda has two thrusts. The first consists of investing in people, knowledge and opportunity and stresses creating knowledge, strengthening our research and development capacity, and building an innovation economy. The second consists of skills and learning and stresses investing in people, strengthening skills and learning, and enhancing opportunities for participation.

He identified three principal drivers of this initiative:

- Rising demand and changing needs for skills, with most new jobs requiring PSE.
- Shifting demographics resulting from low birthrates, meaning that we need higher labour force participation and more immigration of skilled people.
- Outdated learning systems needing upgrading to meet new needs, especially in the area of early childhood development and adult education.

Mr. Larose explained that the current aim of HRDC was to engage in a dialogue on the issues identified in the paper "Knowledge Matters." Specifically, he was seeking input on whether the paper identifies the right directions and milestones, how progress towards achieving the goals can be measured, and what steps need to be taken to reach them.

Speaking of PSE, he said that Canada is still ahead with respect to the proportion of young adults participating, but other countries are catching up fast, partly because enrolment rates in Canada flattened in the 1990s. To meet an anticipated 20% increase

in demand for PSE by 2015, the system in Canada will need to expand substantially. PSE institutions face a number of challenges, from maintaining facilities to recruiting faculty.

Among the priorities for HRDC in helping to meet the new needs, he identified:

- Improved provision of loans for part-time students.
- More financial assistance for people facing particular barriers, including those with disabilities, persons with low literacy skills, and Aboriginal Canadians.
- Measures to encourage and support geographical mobility of students.
- Increased support for training in the skilled trades.
- Promotion of the role of community colleges.

Over the next 12-24 months HRDC intends to conduct a national discussion on such matters through roundtables, best practices workshops, dialogues on "what works" and the engagement of individual stakeholders. This work will be conducted in cooperation with Industry Canada, HRDC's partner in the Government's Innovation Strategy.

Mr. Larose indicated that HRDC officials would be meeting shortly with the CMEC to discuss how best to work together on these issues. He noted that several provinces have released policy papers proposing actions to strengthen learning that are consistent with those identified in the Skills and Learning paper. It will also be important to secure the support of the private sector, labour unions, and PSE institutions.

In response to questions, Mr. Larose commented that the idea of registered individual learning accounts has been the subject of research and discussion. This has led to the conclusion that other means could be more effective as a way to help people participate in learning.

Other areas where research is helping to clarify the nature of the need and possible means for addressing needs include PSE access for disadvantaged groups and the financial needs of part-time students. He also explained that the use of "community college" in the "Knowledge Matters" paper is intended in the broadest sense to suggest forms of PSE other than university, rather than a particular type of institution.

He indicated the willingness of the HRDC Skills and Learning initiative to cooperate with the Canada Millennium Scholarship Foundation and Statistics Canada to help define and support the PSE research agenda.

General Discussions

The afternoon of Day 1 was given over to small group discussions and reporting back in plenary, while on Day 2, a plenary discussion was held.

The results of these discussions are summarized below under the following headings:

1. Access to Post-Secondary Education: Definition and Policy
2. The Need for Research
3. Insights and Suggestions

Access to Post-Secondary Education: Definition and Policy

The first question posed to the discussion groups was "What do we mean by access to PSE? Is there a wide enough range of options for pathways for youth, and should these be part of the discussion?"

The following notes merge the responses reported by the eight discussion groups, noting, where necessary, any areas of disagreement.

Defining "PSE"

There was general agreement in the discussion groups that for purposes of understanding the learning and career paths open to Canadians, PSE should be defined broadly to include not only university and community college programs but those in technical, trade and vocational institutions, including apprenticeship.

In addition, many suggested that private institutions of all kinds should be considered, as well as workplace learning. Others argued that the main focus should continue to be on publicly funded PSE.

There was general agreement that both full-time and part-time studies should be included, as well as distance education and on-line learning. There was some discussion as to whether the term PSE should apply only to programs normally requiring high school completion, but the general view was that the aim should be to develop as complete a picture as possible of the learning options available to young people and adults beyond high school. Some suggested that such alternatives as remedial education and prior learning assessment should also be included in thinking about PSE.

In short, for broad research and policy purposes, it was generally agreed that PSE should include a wide range of formal and non-formal learning beyond high school leaving (not necessarily graduation). Nevertheless, much of the attention in discussion groups was directed to the more traditional concept of PSE as studies directed towards a formal qualification such as a degree, diploma or trade certificate.

Among the issues concerning the nature of PSE raised in the discussion groups were:

- The appropriate balance between work-related training and general education.
- Paying sufficient attention to trade and vocational education and training.
- Understanding the nature, problems and potential of private institutions.

Access

It was generally understood that discussions of accessibility were, until quite recently, concerned primarily with minimizing financial barriers to participation in PSE. Now, however, there is a broader interest in all aspects of the factors that affect participation. Hence, the question is not just how to ensure broad and equitable financial accessibility, but to address the issues of access to what and for whom. It is also to determine how young people (and older ones) can be encouraged and helped to understand their options, make informed decisions and pursue their aspirations. The roles of parents and schools were mentioned frequently.

Some of the discussions suggested that too much of the debate to this point had been driven by economic considerations and dealt largely with increasing aggregate participation in PSE. They suggested that within this overall target, there needs to be more emphasis on equitable access.

One group defined access as having three dimensions: (1) access of entry; (2) access to appropriate learning conditions; and (3) access to results (both successful completion and transition to work).

The discussion groups addressed a wide range of issues relating to access, including:

- Developing the attitudes and interests that lead children to choose PSE.
- Ensuring that children acquire the literacy and other skills needed for PSE.
- Providing information early enough to enable children (and parents) to make decisions affecting PSE without closing off options.
- Helping young people develop the skills for career choices and planning.
- Ensuring that young people retain flexibility to change career paths.
- The implications of rising tuition fee levels.
- Continuing to address the issues of financial access and high debt loads.
- Access for persons with disabilities.
- Access for Aboriginal Canadians.
- Access for black Canadians and other minority groups.
- Problems of access for people in rural and remote areas (geographical access).
- Admission standards as a means of rationing access.
- Admission standards to ensure that those in PSE have the necessary capacity.
- Recognition of foreign credentials (chiefly for immigrants).
- Achieving not only initial access to PSE but retention to successful completion.
- Providing access to a high quality, relevant learning experience.
- Working to improve parental attitudes and support for their children's PSE.
- Understanding the aspirations of children and parents with respect to PSE.
- Addressing cultural barriers to PSE participation.
- Addressing the particular barriers to learning faced by adults.
- Making PSE more flexible and better adapted to learners' needs.
- Using technology to best advantage in delivering learning.
- Encouraging employers to provide workplace and other learning opportunities.

A fundamental issue raised in several groups was whether the policy objective for PSE access should be 100% participation for those with the capacity and motivation (as suggested in the HRDC paper on Skills and Learning) or something considerably more limited. While most felt that some form of learning after high school should be accessible to all, many cautioned that universities and colleges should not dilute their offerings and that if enrolment expanded too much, the economic value of the education would diminish.

The Need for Research

The discussion groups were invited to consider the research agenda for PSE access, including the question of the point at which the research focus should begin. They were also asked about the legitimate domains for consideration of policies designed to increase access to PSE.

How Early?

There was general agreement that, given the importance of early childhood development in preparing for lifelong learning, research on PSE access should begin as early in life as possible (the maternity ward?). A number of groups, however, stressed the equally important need for research on all stages of learning throughout life.

On What Issues?

The discussion groups identified many areas for research within a few broad clusters:

Early Influences

- What shapes the individual's capacity and motivation?
- Importance of parental education, family income, SES.
- The role of schools and teachers.
- How might these factors be influenced (e.g., best practices)?
- How might remedial action be taken?
- Aspirations and expectations – how these form, socialization of preferences.
- How long do such influences persist?

Access to PSE

- Financial planning, decisions on saving, other strategies of parents and children.
- How aspirations evolve and are adjusted to reality.
- How students make choices in high school – information and skills.
- How students and parents view various types of PSE (e.g., vocational).
- Implications of rising tuition and debt load for decision-making.
- Implications of deregulated professional studies tuition (for students and society).
- Continuing work to understand the financial situation of students.
- How student loans affect life after leaving PSE.

The PSE Experience

- What determines whether students complete successfully?
- How to improve success rates in PSE.
- The first year experience, a critical transition.
- The pay-off from PSE – financial and other.

- Whether PSE experience and payoff vary with gender and background.
- Experience of PSE graduates in the labour market (short and long term).

The PSE System

- The current and potential place of privatization .
- Data on private intuitions.
- Issues of goals and governance in PSE institutions.
- Current use and potential of technology, especially on-line learning.
- Capacity issues – can the PSE system meet the expected demand?

Special Needs, Other Situations

- Persons with disabilities.
- Youth from low income backgrounds.
- Aboriginal Canadians.
- Immigrants.
- Minorities (e.g., Black Canadians in Nova Scotia).
- The 50% of young people who do not participate in PSE.
- People in short duration training (<12 weeks).
- People with inadequate basic education and literacy.
- Adults in the work force.
- Non-traditional education opportunities.
- What makes for a culture of lifelong learning in society?

Insights and Suggestions

In a plenary session towards the end of the conference, the Chair invited all participants to identify (1) the most important insights they had gained through the conference, and (2) any suggestions they might have for the PSE access research agenda.

Herb O'Heron of the AUCC pointed to the evidence now emerging, including YITS and PISA, as indicating the huge potential for an increase in PSE demand over the next few years, imposing major challenges – "a capacity crunch" — for universities and colleges, as well as for vocational schools and apprenticeship programs.

Monty Woodyard of HRDC commented that SAEP shows very high expectations on the part of parents for their children's education and that this is in line with HRDC targets for PSE participation. The challenge, he said, is to make this possible.

J-P Voyer of Social Research and Demonstration Corporation called for restraint in building expanded capacity for PSE. While the knowledge-based economy is a reality, it still accounts for less than 10% of the Canadian economy and does not provide enough high skill jobs to absorb all those likely to emerge from PSE over the next decade or so. Adding to the capacity will only depress earnings for the highly educated. He also emphasized the need to understand what we mean by PSE access. What are the goals

of increased participation rates? Do all those who participate have both the desire and the ability to benefit? Different answers to such questions have very different policy implications, he said.

Bill Easton of NPACT expressed concern about the implications of deregulating fees for professional programs, as is happening in a number of provinces. He suggested that this would discourage many potential students and lead to major increases in debt load for others. This was a matter of concern not only to individuals but also to society, as the pressure to pay off the debt might lead doctors, for example, to practice in the city rather than in remote areas where they are most needed. It might also increase the pressure on professionals to leave for the USA in search of higher income. He called for such matters to be included in the research agenda.

Alex Usher of the Canada Millennium Scholarship Foundation commented that increasing participation and broadening participation are not the same thing, the former being a matter of economic importance, while the latter is one of social equity. The key difficulty facing efforts to broaden access through work with parents and schools is, he said, that the undertaking is very labour-intensive and the factors leading to success are still not well understood. We need more discussion in this area.

Jennifer Orum of CASFAA remarked that she had been struck by the complexity of the issues involved in PSE access. As well, she noted that given limited resources it is important to be clear about basic objectives, such as whether the main focus is on helping those most in need – i.e., broadening participation. She suggested that more effort should be given to learning from the experience of the various Canadian jurisdictions and from that of other countries. She commented that public policy in the area of student aid had been quite successful, considering the lack of good data, but now we face important choices and need more facts. Hence the commitment of the Canada Millennium Scholarship Foundation to a research agenda is most timely.

Lori McElroy of the Centre for Education Information in Victoria called for more attention to the basic questions: Access for what goal? What results are sought? She stated that only if we articulate the answers better will it be possible to address the issues properly through intelligent public policy.

Brian Hiebert of the University of Calgary emphasized the importance of increased earning capacity as an incentive to pursue PSE and as the means to enable graduates to pay off their student loans. He called for further efforts to understand why students enter PSE in the first place and why they complete their programs (or drop out). It is not enough to understand the barriers facing students, he said, the research agenda must also explore how they try to cope and how well different strategies work. We need to capture the success stories if we are to design better interventions.

Scott Swail of the Pell Institute for the Study of Opportunity in Higher Education in Washington, DC, noted that the issues of access are equally complex in the USA and Canada, but he suggested that they are more amenable to solution in this country, partly because the number of institutions and jurisdictions is smaller. He called for an approach based on continuous improvement, rather than on the idea of a finite goal to be achieved once and for all.

Darren MacDonald of the Ontario Ministry of Education stressed the need to start early in helping children to prepare for PSE. He suggested that it would be very helpful to have a survey of what is being done in this field across Canada.

Roget Doucet of the New Brunswick Department of Education suggested some areas for research: (1) identifying the challenges faced by students in graduate and professional programs (2) how best to help people survive PSE rather than dropping out (3) the impact of loan forgiveness programs and the approaches taken in different provinces, states and countries.

Monty Woodyard of HRDC called for research into parental contributions to PSE costs. In particular, we know little about how they finance their support for their children in PSE, e.g., through saving, current spending or borrowing?

Robert Sweet of Lakehead University wondered whether we were heading for a situation of too many professors and too few plumbers, given the research on aspirations the conference had heard about. He suggested that the research agenda should pay attention to how people form their aspirations and transform them into more realistic expectations. Specifically, he suggested that it would be helpful to have SSHRC support for studies of why particular women go or do not go into apprenticeship training.

Closing Remarks

Keith Banting of Queen's University offered what he called "a view from the periphery" of the post-secondary education access debate. He remarked that despite the high level of interest in Canada in matters of education, skill development, and social capital, there are too few opportunities to explore PSE issues at the national level; this conference was therefore all the more valuable.

Dr. Banting stated that education and the development of social capital are at the heart of a changing social policy agenda. The current approach places less emphasis on protecting citizens from the market economy through income redistribution and more on helping them to adapt to change and function effectively in that market. Education thus links the social and economic policy agendas. The result may be that we expect too much of education, but it remains very important nevertheless.

Post-secondary education, said Dr. Banting, is going through a period of rapid and extensive change. As universities seek to adjust to new demands, there is major disjunction between the importance attached to social capital (and the resultant expectations of Canadians) and the relatively modest investment of public resources in developing PSE. Not only are the institutions themselves undergoing change, but the frames of reference, goals and criteria for progress are all changing.

In particular, Dr. Banting pointed to a shift in the definition of the issue that was apparent at the conference. Previously, access to PSE had been seen in fairly narrow terms as a matter of removing financial barriers and ensuring that sufficient capacity existed to accommodate those who wished to pursue PSE. Now the discussion had been broadened to include encouraging participation in PSE in order to enhance the capacity of individuals and of society as a whole in both economic and social terms. This latter approach, he likened to the debate on the determinants of population health, suggesting that the focus might be placed on "determinants of education attainment." The discussion is thus about a wide range of influences from early childhood on, notably those of parents and schools, that help to determine the individual's educational future.

Dr. Banting suggested that if the debate is defined in these broad terms to address the whole question of an educated population, then it is all the more important that it engage the public. He noted that, on the whole, wealthier countries have both higher average

levels of education and more equal distribution across income levels. To preserve this relative equality of access, we should be prepared to discuss openly such questions as the fairness of large student debt loads and to address explicitly the related values and ideology. Canadians are prepared to assert their values regarding access to healthcare, he said, so why should they be reluctant to discuss access to PSE in the same terms.

Commenting on data issues, Dr. Banting said that research should not be just about data gathering but also about goals and values. He advised those studying PSE to look to other fields of social science for the tools and models they would need for a broader research agenda. He noted the difficulty of evaluating programs and initiatives designed to improve educational access. He suggested that the health promotion efforts offered useful examples of government involvement in changing the behaviour and aspirations of a population.

Dr. Banting closed by advising participants to invest in thinking about the goals and values involved in access to PSE as a prelude to dealing with the flood of data that could be expected in coming years. It would, he said, be an exciting time to be involved in these important issues, "but we need to know where we want to go."

On behalf of the Canada Millennium Scholarship Foundation, Alex Usher thanked participants and presenters for a very helpful discussion which, he said, represented just the beginning of a major effort to understand better the issues of PSE access. He looked forward to holding another such conference in 2003 to explore the results that would then be available from the on-going research.

Conclusions: Issues and Research Topics

This section represents an effort by the conference organizers to draw from the discussion some key themes, central ideas and possible research issues and strategies.

The Nature of the Debate

There was broad agreement among participants that the prime focus of the debate on access to post-secondary educations had shifted since the 90s. While matters of student financing, such as loan limits, interest relief and debt load, remain important, broader issues of access have come to the fore in recent years. These include not only how many people should participate in PSE, but whether opportunities are equitably available to all who might benefit. In other words, the discussion has, to a degree, shifted from mechanisms of access to the underlying social values involved.

Several speakers suggested that a concern with broad accessibility is important not only from the point of view of equity but also because societies where educational opportunity is widely distributed tend to have higher levels of average achievement.

The Issues of Access to PSE

What is PSE?

While much of the discussion focused on universities and colleges, there was general agreement that it was important to take a broader view of the learning opportunities available after leaving high school. Trades training, including apprenticeship, and various kinds of private sector learning programs need to be included when helping young people – and adult learners – decide on their career paths. Some of the participants emphasized the need to provide youth with information about a wide range of possible

learning trajectories and to ensure that they have the flexibility to make mid-course corrections rather than being limited by their initial decisions.

Aspirations and Expectations

Participants were struck by the extraordinarily high aspirations of youth and their parents with respect to PSE participation (particularly university), as revealed in recent surveys. When combined with high rates of secondary school graduation but limited access to PSE, these findings suggest that increasing numbers of families will be forced to adjust their expectations.

Capacity of the System

Access is meaningless unless the places exist in learning programs to accommodate those with the motivation and capability to benefit. There was a good deal of discussion concerning the apparent need to expand by as much as 30% the number of places in PSE over the next few years if a demographic bulge in the youth population, combined with rising expectations regarding participation, is to be accommodated. The looming capacity crunch results not only from an insufficient volume of plant and equipment to accommodate all the students who want to attend, but also from the need to address deferred maintenance requirements that developed over recent years. Further, there will be a need to increase the number of faculty, at a time when replacement needs are increasing sharply. The latter reflects a wave of retirements of faculty who were hired in the 1970s in response to the last period of rapid increase in PSE participation.

The question of the optimum volume and mix of PSE opportunities remained on the table at the end of the conference. There was, however, a high level of support for expanding the range of PSE, particularly with respect to vocational training and workplace learning.

Quality of Learning

Together, strains on the system in the form of insufficient physical capacity, along with possible large increases in the ratio of students to instructors, raise serious concerns about the quality of the overall post-secondary experience for those students who manage to enrol. While some observers suggested that distance education or e-learning might fill some of that gap, others argued that technology, though a useful tool, cannot replace more traditional forms of teaching and learning.

There is another aspect to the capacity/quality debate. Some cautioned that significantly increasing capacity would, by opening the doors wider, reduce the quality of the overall student body and in the end, by diluting the value of PSE, be self-defeating. Further, too many post-secondary graduates in the labour market might erode the financial benefit conferred by a post-secondary degree or diploma.

The question "Access to what?" was raised a number of times in connection with concerns over the decline in government funding of the system – what several people called Canada's "disinvestment in PSE". Some suggested that there is little point in broadening access if the quality of education is thereby eroded. This issue can only become more acute as the demographic pressures of the next few years put still greater strains on institutional resources.

It was also noted that the goals and milestones set out by HRDC in the paper "Knowledge Matters" seek to increase the numbers participating in PSE but do little to address the challenges of either capacity or quality in the system.

Financial Barriers to Participation

Dealing with financial barriers to participation in PSE remained an important theme of the discussion. One issue of concern was the apparent inequities in the expected contribution of parents, which seem to some to create a hardship for certain families. Specifically, there was concern about families whose income is too high to qualify for student financial aid, but too low to comfortably accommodate the costs of a post-secondary education for their children. One can expect that this problem will only grow in coming years if the trend to rising tuition costs continues without corresponding adjustments in student aid criteria.

Another longstanding concern was the rising level of student debt on graduation, though it was pointed out that the real issue is not debt per se but ability to repay (i.e., debt-to-income ratio). The reasons for rising debt load came in for considerable discussion, some arguing that rising tuition and living costs are the main factor, while others emphasized the increase in borrowing limits as the key. It was clear that total borrowing, from both government programs and private sources, and its implications for the individual, will continue to be an area of intense scrutiny.

A relatively new issue emerging in some provinces, and expected to apply in more, is the deregulation of tuition fees for many professional programs. It was argued that one result of this will be reduced access to these programs for lower income students. It was noted, however, that universities are setting aside a substantial portion of the fee increase to provide expanded financial assistance to such students. Another concern was that the high cost of professional training might distort career choices by graduates of such programs, who would be more inclined to enter specialties and go to locations where the pay is highest.

Determinants of Participation in PSE

Throughout the discussion there were references to the need to influence and counsel potential PSE participants at an early age. The importance of parental education (and to a lesser extent parental income) in generating interest in children was noted repeatedly, as was the need to provide children and parents with better information about the full range of PSE opportunities and requirements.

While there was general agreement that early intervention was important to help children from disadvantaged backgrounds gain access to PSE, it was less clear how this might best be achieved in practice. Some wondered whether, given the importance of the parental role, helping parents learn might be the best way to help children. The examples of US programs seemed to suggest that key factors in successful interventions were an early start, a combination of support services and financial help, coordination of the various programs of help, and long-term positive interaction between children and adults. In the end, personal support to the individual child was what counted the most.

Needs of Particular Groups

The special needs and problems of some groups in society with respect to PSE participation were discussed by several speakers. These included the difficulties faced

by Aboriginal Canadians, particularly young males, who still have low rates of participation and successful PSE completion. Solutions include reaching out to the Aboriginal communities to include them in the development of PSE programs better suited to the needs of their people and offering such programs much closer to home. Universities and colleges would be able to do a better job of developing specialized curriculum and support services if they could rely on sources of long term funding for Aboriginal programs.

Similarly, the needs of persons with disabilities were seen to be met with varying degrees of success in the PSE system. One problem appears to be that children with disabilities feel excluded from PSE because they are not aware of the support services that do exist. Again the issue was better information and counselling.

Whether boys should be considered a disadvantaged group from the point of view of learning (as is the position taken in some countries) was the subject of an interesting if inconclusive discussion. There generally appeared to be other factors at work which interacted with gender to create the problem. For example, young male Aboriginal or visible minority Canadians seem to be at a particular disadvantage, as do those from low income backgrounds more generally.

Research Issues

Throughout the conference, and particularly in the closing plenary, participants identified a wide range of issues for further research. The following summarizes the main themes.

The PSE System

- *Vision and Goals.* What vision of PSE do Canadians hold for the future – is it one in which all Canadians who wish to go to PSE can do so or is it a system that rations access to PSE in some way? How will the selection be made – on the basis of academic excellence or on the basis of ability to pay?
- *Size and Mix.* Is the current scale and composition of the Canadian PSE system appropriate to the needs of the next two or three decades? What role is played, or might be played, by apprenticeship, vocational training and private training institutions, along with colleges and universities? Is the conception of what constitutes 'valuable' PSE (i.e. college or university) too narrow or do we have about the right mix?
- *Costs.* Decisions regarding issues like these will have very important implications for the overall costs of the PSE system. What are the costs associated with different scenarios?
- *Capacity Crunch.* Is there a looming 'capacity crunch' developing in the PSE system in Canada? Are some parts of the system facing a more severe capacity problem than others? What kinds and levels of investments are needed to match PSE supply and demand – in plant, equipment, staff and faculty, technology?
- *Quality.* Are current financial pressures adversely affecting the quality of PSE available to Canadians? What is needed to maintain and improve quality in the face of the capacity crunch? How should we measure quality?
- *Impact of Increasing PSE Participation.* Would having significantly higher levels of PSE completion in the population dilute the financial returns to PSE? To what extent might it reduce the quality of the experience? What is the relationship

between these two outcomes? Are there links, for example, between the quality/quantity trade-off and Canada's on-going weak performance in terms of productivity growth?

- *Expectations*. High school students are encouraged to do well academically and to pursue a program of study that ensures they have the option to participate in PSE if they want to. Are we engendering high aspirations for PSE among young people and their parents that will be met with disappointment later?
- *Efficiency vs. Equity*. What is the size of the trade off between efficiency and equity? How should 'efficiency' be defined and measured? How should 'equity' be defined and measured?
- *Alternative Delivery of PSE*. How effective are various non-traditional PSE approaches, including distance education and other applications of technology in delivering educational services? Do they offer opportunities for improving either cost-efficiency or effectiveness of learning? Who might they best serve?

Decisions to Participate

- *Early Influences*. What are the early influences that shape (positively or negatively) a child's future interest and capacity to participate in PSE? How might these be shaped or overcome by remedial interventions?
- *Parental Roles*. We know that parents have a very strong influence on the academic achievement of their children and in the decision to participate in PSE. What kinds of interventions are needed to help parents play an effective role in helping their children do well in school and in helping them shape their plans for further education past high school?
- *Young Males*. There is evidence to suggest that the educational participation and achievement of young males is lagging behind that of young females. What is the Canadian evidence on this and what factors are having a differential impact on boys and girls, young men and young women?
- *Information and Counselling*. Students in Canada face what is often a bewildering array of choices regarding their schooling. Some of these concern choices of courses to take while in the early years of high school. Others concern choices of type of PSE, which institution, which field of study, potential financing, including student loans and scholarships. But often, neither youth nor their parents have the information they need to make intelligent and informed choices. What is the state of academic and career counselling in Canadian schools? Are students making program choices while in high school that preclude their participation in certain kinds of post-secondary programs later? When and how do parents and children get the information they need, if they get it all?

Groups Not Well Served by PSE

- *Special Groups*. How well are various groups served by the PSE system and what is needed to improve their opportunities? Such groups include part-time students, Aboriginal Canadians, low-income youth, persons with disabilities, adults in the labour force, immigrants, etc.
- *Succeeding in PSE*. Some observers note that the proportion of students who drop out during their first year of PSE or who fail to complete PSE is relatively

high. What are the reasons for failing to complete PSE? Are they financial, related to distance from home, higher for students who are weak academically, a function of dissatisfaction with the quality of the PSE experience, and so on? Are some groups more affected than others – for example, do Aboriginal students face a more difficult transition for cultural reasons? Are there special programs in place designed to assist students in their transition to PSE? What are best practices in this regard?

- *Meeting Skill Needs*. Even with a significant expansion of the PSE system, there will remain in coming years a very large number of young adults who do not have any education past high school. Are they adequately prepared for the world of work? Do they have the skills they will need? How can they be equipped with those skills? What role can and should the high schools play in this regard?
- *Corrective Action*. Is there a role for the PSE system in providing skills to young people who are no longer in high school? Does the current system offer enough flexibility and choice to accommodate the variety of learning needs that exist in the non-student population? More broadly, how can a more vigorous culture of lifelong learning be developed in Canada?
- *Implications of Inaction*. Will failure to address the needs of this group mean that the future of Canada will be one of educational haves and have-nots with a widening gap between socio-economic groups? Is it the case that societies in which the socio-economic status gradient is relatively flat tend to have better overall learning outcomes, and as a result, a more widely distributed capacity for both social and technological innovation?

Financial Issues

- *Financial Factors in the PSE Decision*. How do financial factors affect the decision to participate in PSE and what financial aid is needed to minimize financial barriers? How do financial factors affect other aspects of the PSE decision, including for example, choices regarding type of institution to attend, field of study, where to attend? How does the trend to higher tuition fees generally, and in professional fields more specifically, affect student choice and access?
- *Deregulation of Tuition Fees*. Does deregulation of tuition fees and the steep rise in tuition costs for professional programs in particular mean that certain groups, like young people from lower- or even middle-income families, Aboriginals, and young people from rural areas, are essentially excluded from the pursuit of advanced studies in professional fields? What are the implications for diversity and representation in the professional occupations? Does the rise in fees tend to drive some graduates into specialties and locations where they can realize the greatest financial returns?
- *Impacts of Student Loans*. The student loan mechanism appears to be an efficient instrument of public policy, but does debt load have adverse consequences for some students, either with respect to participation in and completion of PSE or in life after completion? What impact does the current student financial aid system have on families? Do some families face a much higher burden than others? Are some groups bearing a larger debt burden than others – for example, do students from lower-income families graduate with

disproportionately high levels of debt compared to other students? How can the system be made both efficient and fair?

- *Debt Repayment Issues.* It has been noted that what matters is not absolute debt levels, but the debt-to-income ratio in the years following graduation from a PSE program. What does the debt-to-income picture look like in the provinces and territories? How should we define 'student debt' – should it include, for example, not only government student loans, but also other debt like bank loans, credit card and line-of-credit debt, repayable loans to family members? What impact does having a requirement to pay back what are significant debt loads for some having on young adults? For example, do these debt levels affect decisions around home-buying or family formation? Do they affect decisions regarding where to work or occupational choice? To what extent do debt levels reflect 'ability to borrow' as opposed to real need?
- *Debt Relief Measures.* Some jurisdictions have introduced programs designed to provide debt forgiveness and interest relief for some students. How much relief do these programs in fact provide? Who gets such relief and where? When do (potential) students learn about the availability of relief? How do they learn about it? How does knowledge of the possibility of relief – or lack of such knowledge – affect decisions regarding participation in PSE, the kind of PSE institution, or the field of study?
- *Attitudes to Debt.* How do attitudes to debt vary across sub-groups in the population? Are there differences across cultural groups, for example? Does the experience of low income mean that young adults from lower-income families are more risk-averse than other young adults?

Research Strategy Considerations

The research issues identified at the conference span a wider range of PSE-related issues than any focussed effort could hope to address. How might priorities be established for a national research effort to improve the strength and accessibility of Canada's PSE system?

First, important as early childhood education has turned out to be, it remains an area more appropriate to social-policy concerns and to longer-term academic research. As such, it arguably falls outside the scope of research aimed at more immediate issues of PSE access. That is not to say that early influences on children's attitudes, motivations, and behaviours are not of vital importance, but more simply that some research directions have the potential to deliver results that can have greater impacts in the short term.

Second, national discussions about education raise issues around jurisdictional responsibilities and interests. The scope and importance of PSE issues speak to a need for cooperation on research, data sharing, and so on.

Third, certain areas appear to stand out as being of direct importance to the PSE policy agenda and, at the same time, as being open to new research approaches and the fresh sources of data now becoming available. Three such areas of special importance where research could inform the policy agenda are:

- Capacity, quality, mix and financing of the PSE system in a time of demographic and social pressure ("Access to what?").

- Meeting the needs of special groups, including Aboriginal Canadians, persons from low-income families, and persons with disabilities ("Access for whom?").
- Financial factors that aid or impede access to PSE ("Access how?").

It will be important, as the research results flow in, to discuss strategic issues of where to put the emphasis in follow-up work so as to achieve a maximum contribution to the national policy debate and various program development efforts.

Final Thoughts

The conference began with the question of how to improve access to post-secondary education but ultimately much of the discussion concerned what we *mean* by 'access to post-secondary education.' Do we mean increasing the number of participants or broadening participation to include underrepresented groups, or both? What is the purpose of post-secondary education? In a world in which a post-secondary education is seen as essential for vastly improving one's life chances and in which education and skills are seen as necessary for success in the labour market, should the opportunity to acquire a post-secondary education be denied anyone who is willing to work hard in school to achieve it? That would argue for a system that is open to all. But that in turn has very major implications for the amount of resources allocated to the system to allow it to have the capacity to accommodate all who want to attend.

Difficult choices, but choices that need to be examined explicitly, since, to quote Yogi Berra, "If you don't know where you're going, you're likely to end up somewhere else."

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Annex C: Agenda

Day 1

Opening Remarks

James Downey, University of Waterloo, Conference Chair, Norman Riddell, Canada Millennium Scholarship Foundation

Session I – Trends in Post-Secondary Education

Trends in Post-secondary Participation and Costs – Jillian Oderkirk, Statistics Canada

Why Don't They Go On: Factors Affecting Youth Who Do Not Pursue Post-secondary Education – Dianne Looker, Acadia University

Trends in University Finance and Capacity – Herb O'Heron, AUCC

Session II – Preparedness for PSE

Academic Achievement among Canadian Youth – Results from the Program for International Student Assessment and the Youth in Transition Survey (PISA-YITS) – Scott Murray, Statistics Canada

Male Underachievement in School Performance: Gender and Social Capital – Nancy Mandell, York University

Valued Career Paths: Broadening the Scope of Post-Secondary Education – Bryan Hiebert, University of Calgary

Session III – Participation in PSE: Attitudes, Aspirations, and Finances

Participation in Post-Secondary Education: Exploring the Roles of Family and Government – Paul Anisef, York University and Robert Sweet, Lakehead University

Access to Post-Secondary Education: Family Background Effects and the Role of Student Financial Assistance – Ross Finnie, Queen's University

Community, Neighbourhood and Family Factors in PSE Participation – Dan Keating, OISE and Canadian Institute of Advanced Research

Small Group Discussions

Small Group Reports – Plenary

Day 2

Session IV – Financial Assistance for PSE

Report on Student Income and Expenditure Survey – Susan Galley, Ekos Research Associates

Student Loans and Student Debt – Alex Usher, Canada Millennium Scholarship Foundation

Improving Student Aid Needs Assessment - Issues and Options – Fred Hemingway

Session V – Intervention Programs

Investing Early: Characteristics and Best Practices of Early Intervention Programs in Selected U.S. States – Alisa Cunningham, Institute for Higher Education Policy

Academic Interventions for PSE in the United States – Scott Swail, Council for Opportunity in Education

Best Practices in Enhancing Aboriginal Participation in Post-Secondary Education: Canadian & International Perspectives – Robert Malatest, Malatest and Associates Ltd.

Lunch – HRDC Presentation on Skills and Learning Agenda

Plenary Discussion

Closing Remarks

Keith Banting, Director, School of Policy Studies, Queen's University

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